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Factsheet

XFT Task Manager

www.xft.com/en/product/xft-task-manager

SAP Silver Partner

SAP® Certified
Integration with SAP S/4HANA®

About XFT Task Manager

Flexible Electronic Files with Process Management

In practically every business process, you use documents and SAP objects – from creating a contract, to hiring a new employee, and editing a quote. The more complex the process, the more difficult it is to maintain an overview. Which tasks still need to be completed? Will the deadlines be met? Have you got all necessary approvals? What have your employees already discussed with the customer?

XFT Task Manager enables you to map your business processes in process files or gather information about your business partners, products, and other objects – all in a single system. The software combines electronic file management with functions for structured task management – integrated directly into your SAP system. In this way, you always have the information you need at a glance.

Overview of Features

File Functions

- File structure, views, and functions can be defined in the file template
- Flexibly definable header data area with an overview of the most important file and process attributes as well as relevant SAP master data and context data
- User Interfaces for SAPGUI, SAPUI5, and SAP Web Dynpro
- Flexibly definable column configuration (approx. 40 standard columns plus 10 free columns)
- Ad-hoc enhancement by the user can be permitted
- Authorization-based control of visibility and functions
    - Integrated use of the SAP user role and authorization system
    - Enhanced authorization concept for mapping complex authorizations
- Clear logging
- Classification of tasks and objects
- Note function for creating ongoing permanent notes on files and tasks
- XFT Organizer as a central cockpit for file management
    - Integration of searches
    - Link to all required SAP transactions
    - Overview of the processes last edited
    - Favorites function

Process Integration and Control

- Mapping of processes and objects relevant for these processes
- Definition of status networks, deadlines, and responsibilities at task level

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- Task-related deadline and status monitoring
- Ad-hoc enhancement of the process by the user can be permitted
- Resubmission function for the entire file, sections, and individual tasks
- Status-dependent activation and deactivation of file functions
- Together with the integrated XFT Compliance Cycle, approvals can be obtained or tasks distributed
- Integration of processes from SAP Business Workflows, mail processes, or background processes controlled using XFT Queue Manager (such as task forwarding)
- Process action modelling using a custom action control component
- Overview of open tasks and deadlines through integration in the XFT Dynamic Work List

Documents

- Drag and drop from the Windows file system
- Drag and drop e-mails and attachments (directly from the mail client using Outlook plug-in)
- Export the file to the Windows file system
- Document preview with navigation feature within the file
- Integrated template management for MS Word templates (with data flow)
- Inbound Documents
    - Processes for inbound documents
    - Scanning integration using SAP ArchiveLink standard procedures (barcode, dialog scanning, and so on)
    - Document check-in
- XFT Super Document
    - High-performance access to documents, taking into account SAP locations and cache servers)
    - Document display according to document type
    - Document editing directly from the file (including non-Office documents)
- XFT Upload Manager
    - The user can continue to work in the file during document storage
    - This reduces the storage time, particularly for very slow system connections or large files
- Integration of the SAP full-text search

Web Representation SAPUI5

- The SAPUI5 interface offers a modular representation through various components and configurations
- The head area and components can be easily expanded and specialized
- Integration of action control for state changes and element role classification
- File nodes can be visualized in various forms (e.g. for documents, file references or in the complete view). The following functions are available:
    - Navigation through the file structure

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    - Document upload per drag & drop or via upload dialog
    - Change node status
    - Node dialog (General, Appointments, Editors, Note, Entry Data, ...)
    - Jump to SAP Business Objects, file references, etc.
    - Project extensions (e.g. further jumps, maintenance of additional node data, etc.)
- Generic display of file attributes for simple project extensions
- Display of the file log
- Configurable search for files or file contents (e.g. documents)

Integration

- Full integration with SAP Folders Management, SAP Case Management, and SAP Business Workflow
- High degree of integration with all SAP business applications and business objects
- File can display objects integrated from different SAP systems and content servers
- Client integration with Windows Explorer (using XFT Document Connector)
- Client integration with MS Office, MS Outlook, and Lotus Notes (using XFT Document Connector)
- Archive integration using SAP ArchiveLink interface (including SAP Content Server)
- Easy integration with cloud or web applications through SAPUI5 interfaces

Would you like to learn more about our products or see what XFT Task Manager can do for your business? Contact us today for a live demo!

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